

# Case study: social selling program

## Company Overview

**WEALTHSTREAM**  
ADVISORS, INC.

An independent boutique RIA wealth management firm built on meaningful relationships with a select group of clients.

## Objectives

- Increase awareness of company, team leaders
- Increase assets under management (AUM)

## Target audience

High net worth individuals in specific segments

*“Robert’s insight and guidance have helped us increase our awareness and appointments.”*

- Michael Goodman, CEO

## Situation

Wealthstream Advisors was looking to jump start growth with both new and current clients in a world with increasing competition.

## Solutions

- Revamp LinkedIn profiles of key team members to be customer-centric and increase findability
- Establish company leaders as thought leaders in industry via value-adding content on LinkedIn
- Follow-up with key contacts via social media
- Convert to phone, in-person meetings using scripts

## Results

- Team members saw a **dramatic increase in profile views**
- Team members saw a **large amount of content engagement** (100s of engagements on some posts)
- Team **scheduled meetings with their target audience** and key influencers